



JOB DESCRIPTION

Title: Assistant Branch Manager

Reports to: Branch Manager

Purpose: This position will continually assist the credit union in delivering its Service Mission to the members: "We will help our neighbors achieve their financial dreams" by providing high quality service both internally and to the members.

This position will assist Branch Manager in guiding branch office staff by providing quality service to members, through sales and service of products with the expectation of meeting or exceeding branch and individual goals.

SERVICE PROMISES

- I promise to treat you with the highest standards of respect and professionalism.
- I promise to make it easy to do business with us.
- I promise to ensure the security of your financial information.
- I promise to be knowledgeable regarding your request.
- I promise to respond to your requests in a timely manner.
- I promise to deliver accuracy in all of my work.
- I promise to identify your needs and suggest a solution that will improve your financial life.

REQUIRED SKILLS AND EXPERIENCE

- Proven Sales skills, by demonstrated success in consistently meeting sales/production goals
- Staff Coaching in Sales techniques and achievement of retail sales goals both on the individual level and branch level.
- Experience in processing account transactions, loan applications, new accounts
- Ability to problem solve within established policies and procedures, with the understanding and compliance of all state and federal regulations and laws.
- Experience in ensuring compliance with all governing regulations, especially Bank Secrecy Act requirements including: Currency Transaction Reports and monitoring and reporting as appropriate any suspected suspicious activity. Also, knowledge of Office of Foreign Asset Control (OFAC) requirements.
- Employees will also have Bank Secrecy Act knowledge as it may relate to the lending functions.
- Ability to recognize cues for sales opportunities and identify unexpressed need.

- Ability to accept and perform new job responsibilities as needed.
- Ability to accept change when required in performance of job responsibilities.
- Ability to learn and utilize new technologies.
- Good Oral and written communication skills in handling both employee and member relations.
- Make effective referrals to other specialists when appropriate

DUTIES AND RESPONSIBILITIES

In addition to proficiency in the Member Service Representative I, II, and III duties and responsibilities, the Assistant Branch Manager will be responsible for the following:

- Thorough knowledge of credit union products and services.
- Coaching to meet branch and individual sales goals.
- Maintain a highly motivated, well-trained staff along with maintaining effective employee relations.
- Develop the MSR's in sales, technical and people skills.
- Ensure that credit union policies and procedures are adhered to.
- Ensure adequate staffing for efficient branch operation.
- Be in compliance with Federal laws and regulations set forth by the National Credit Union Administration and other regulatory agencies.
- Perform all job responsibilities with a positive approach at all times.
- Resolve member problems that require a management-level decision.
- Responsible for MSR department evaluations in MSR area.
- Advise Branch Manager of any department or branch office issues.
- In the absence of the Branch Manager have working knowledge of these responsibilities.
 - Monitor key products/sales within branch to ensure profitable and sound business practices for the credit union, a high quality of service for members, and that employees are maximizing opportunities to cross-sell products and services.
 - Manage the security and safety of the branch. By having responsibility to adhere to security and safety policies and procedures, and to alert staff to any changes.
 - Ensure that the opening and closing procedures, (i.e. alarms, vault, balance ATM's, night deposits, etc.) and end of day balancing of branch are being completed by branch head teller, branch staff, and assisting when necessary.

DESIRED EDUCATION/ Experience

- High School Diploma
- Credit Union Experience
- Possess minimum of three years of related experience to include proven sales and lending competency.
- Banking courses or related seminars

DESIRABLE PC SKILLS

- Proficiency with Microsoft Word, Excel, Outlook
- General computer familiarity
- Working knowledge of banking software- Symitar System proficiency a plus.

BEHAVIOR STANDARDS

- Ability to work professionally with credit union members and staff.
- Display courtesy and attentiveness to both members and co-workers
- Flexibility/Willingness to change as job evolves and daily schedule changes.
- Recognition of members, greet with a smile and use members name whenever possible.
- Upon completion of branch visit – ask member if “there is anything else I can do for you today” if not, “Thank you and have a nice day” (Sample Language)
- Patience and understanding with difficult members
- Team Player